

## LEVEL 4

30 & 31 | May 2019

# CLIENT RELATIONSHIP MANAGEMENT



Duration: 09:00 – 17:00

Application deadline: 27<sup>th</sup> May, 2019

Contact: +389 2 125 500, +389 70 355 656

Location:

Skopje (North Macedonia)

Academy of Banking and Information Technology

This highly interactive two-day course is designed to help client facing bankers upgrade their interpersonal skills in a number of areas, as well introducing structure and discipline around the process of managing and originating client relationships. Participants complete a psychometric assessment before the program and during the course we introduce the ideas behind psychometric profiles and show participants how they can help better understand the behavioral preferences of clients and colleagues. The program considers what the Bank needs to achieve from its client relationships and introduces tools to help forecast clients' future financial requirements and identify potential cross-selling opportunities. Wallet sizing and how to get your 'fair share' of the wallet are covered in detail. The course also covers personal effectiveness in the area of communication and presentation skills. The course uses banking-based cases, role-plays and exercises to make the content feel relevant and highly contextual

### Who Should Attend?

This course is intended primarily for client facing relationship managers in commercial and/or corporate banking roles. It is also relevant for other bankers who work with external clients.

### Key Learning Outcomes

After completing this course, participants will be able to:

- Measure a client relationship's value by revenues, profits, capital and time allocation
- Make forecasts of likely future needs for financial products and services to develop a cross-selling strategy
- Perform a wallet sizing exercise and demonstrate to the client the value of the services and Balance Sheet the bank is providing
- Cross-sell efficiently, appreciating the issues of trust that are critical to successful up-selling
- Understand their own behavioural preferences for communication, decision making and information processing
- Identify the behavioural preferences of others and adapt their behaviour to have more successful interactions
- Have learned some strategies that are positive for building trust in business relationships, and identified other courses of action that undermine trust
- Use techniques for more effective communication, presentation and objection handling

## Course Content

### Day 1

- ✓ Positioning the bank,
- ✓ Client portfolio review process,
- ✓ Introduction to Jung,
- ✓ Understanding your own behavioral preferences,
- ✓ Adapting to others,
- ✓ Building trust

### Day 2

- ✓ Questioning and listening skills,
- ✓ The importance of brands,
- ✓ Presentation structure and design,
- ✓ Presentation delivery,
- ✓ Question and objection handling,
- ✓ Wallet sizing,
- ✓ Creating more wallet,
- ✓ Discipline in relationship management

## Participation

- **€ 890**(international German/EU Certificate for level 4 certification in Certified Branch Manager, including materials, coffee and lunch);
- **80%**of participation for second participant from the same institution(**€ 712**)
- **50%**of participation for the third participant from the same institution(**€ 445**)

**Note:** Participants who have the specialized Diploma for Certified Branch Manager – CBM (with completed 3 levels) will be able to pay only 50% of the co-payment(**€ 445**)

## language of training

English language

## International expert (lecture)



Prof. Dr. Roland Kupka,



Head of Financing Team at Bankhaus Lampe KG, Düsseldorf and Frankfurt

After the successful completion of his MBA, Mr. Roland Kupka has been working as a trainer and lecturer for different German financial institutions with comprehensive experience for many years. His successful lectures focus on sales topics in Corporate Banking / Corporate Finance, SME Financing, and Credit Risk Analysis of credit institutions.

Besides traditional forms of debt financing, he has extensive experience particularly in the areas of Off-Balance-Sheet financing, such as Leasing, Factoring and Asset-backed transactions (ABS), as well as Leveraged and Management Buyout financing (LBO / MBO), Project-, Mezzanine-, Syndicated-, Capital Market- and Acquisition financing.

In addition, Mr. Kupka has extensive expertise and know-how in Credit

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Risk Analysis, management of non-performing loans (NPL) and also a profound knowledge of SME restructuring.

After working as a credit analyst and relationship manager for more than 30 years, Mr. Kupka is a senior executive in sales and credit risk management. For many years he has worked in the public and private banking sector; Ten years of which in an international environment for a major Scandinavian bank, where, as a member of the extended management, he was responsible for business activities in Germany under income and risk aspects. Furthermore, he successfully coordinated and extended the reach of the bank's international network in Scandinavia, the UK, and Asia.

Mr. Kupka has particular knowledge regarding the acquisition of and holistic cooperation with medium-sized corporate clients as well as their owner families. Extensive and versatile knowledge in the successful leadership and management of sales teams, personnel management in change management situations, credit portfolio management, as well as project management complete his skills.

#### WORK EXPERIENCE

10/2017 – present Bankhaus Lampe KG, Düsseldorf and Frankfurt

Head of Financing Team

Cooperation with Branches and respective retail- as well as corporate customers regarding all financing subjects. Responsibility for a credit portfolio with a volume of MEUR 500, personal credit limit of MEUR 3,5

10/2007 – 09/2017 Svenska Handelsbanken AB (publ), Hamburg/Frankfurt  
Branch Manager of Hamburg Branch (10/2007 - 12/2010)

Area Manager and Member of the Management of Handelsbanken in Germany (since 01/2011)

04/2005 - 09/2007 HSH Nordbank AG, Hamburg/Kiel

Head of syndicate transactions corporate business

10/2004 - 01/2005 Kreissparkasse Saarpfalz, Homburg/Saar

Head of Corporate and Credit-Business

07/2000 - 09/2004 Taunus-Sparkasse, Bad Homburg

Business Area Manager corporate business

01/1993 - 06/1996 Bankhaus Löbbecke & Co., Frankfurt

Corporate Relationship Manager

10/1991 - 12/1992 Privatbankiers Merck Finck & Co., Frankfurt

Credit Liaison Officer

01/1989 - 09/1991 WestLB - Westdeutsche Landesbank GZ, Düsseldorf

Credit Analyst

10/1987 - 12/1988 Landesgirokasse, Stuttgart

Trainee Program Private- and Corporate credit business

04/1984 - 09/1987 Stadtparkasse Remscheid

Internal Audit, Investment advisory, Retail banking

#### APPLICATION

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Level 4: CLIENT RELATIONSHIP MANAGEMENT | Certified Branch Manager | Internacional certification


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Please fill the application and sent to the following e-mail: [info@abit.edu.mk](mailto:info@abit.edu.mk) ; [info@ibmhs.eu](mailto:info@ibmhs.eu)

Academy for Banking and Information Technology  
HEIDELBERG Institute Skopje  
Contact: +389 2 125 500, +389 70 355 656

## APPLICATION FOR PARTICIPATION

Name	
Surname	
Bank	
Personal identification number of the Bank	
Tax identification number of the Bank	
Workplace	
	
e-mail @	

### COURSE FEES:

The payment for the training is **€ 890**

The second participant from the same bank, 20% discount **€ 712**

For the third participant, 50% discount **€ 445**

Participants who have the specialized Diploma for Certified Branch Manager – CBM (with completed 3 levels) will be able to pay only **50%** of the co-payment (**€ 445**)

### PAYMENT DETAILS:

#### Heidelberg Institute Skopje

Bank: NLB Banka AD Skopje  
Bank address: St. "MajkaTereza" No. 1 Skopje  
IBAN: **MK07210701001330263**  
SWIFT CODE: **TUTNMK22**

#### Academy of Banking and Information Technology ABIT –Skopje

Bank: NLB Banka AD Skopje  
Bank address: St. "MajkaTereza" No. 1 Skopje  
IBAN: **MK07210722000039546**  
SWIFT CODE: **TUTNMK22**